

4. INDUSTRY STAKEHOLDER ANALYSIS

4.1 INTRODUCTION

To be successful, any changes in trucking-related regulations and policies will need to take into account the needs of those directly affected. Naturally, this includes the companies that conduct trucking operations and the firms that rely on their deliveries. To gain a better understanding of the needs of truck operators and their customers in the District, Volpe interviewed representatives from approximately 25 truck-related businesses and organizations.

Organizations participating in interviews included truck operators, recipients of truck deliveries, and industry interest groups. Interviewees were promised anonymity in exchange for candid responses, so this report does not include the names of the people interviewed or the businesses or organizations they represent. However, the following list identifies the categories of truck-related organizations that participated in this study:

- Food, beverage, and linen delivery companies
- Parcel and letter delivery services
- Department stores and supermarkets
- Conference facilities
- Apartment and office buildings, restaurants
- Utility and construction companies
- Trade groups and Business Improvement Districts (BIDs)

The interviews focused on the traffic-related problems that these businesses and organizations encounter in providing or receiving services in the District. While the interviews varied slightly depending on the type of organization being interviewed—such as truck operators, delivery recipients, and industry organizations—all interviews dealt with the following subject areas:

- Information about the interviewee's current and future truck-related operations
- Communication and logistics technologies employed
- Problems with truck travel in the Washington area
- Effect of these problems on truck-related operations
- Effect of existing truck restrictions on truck-related operations
- Safety and security issues

The interviewees represent a broad range of truck operators and their customers. However, no attempt was made to generate a randomized or fully representative sample of trucking firms.⁷ These findings should thus be interpreted as illustrative of the range of issues faced by typical truck operators and customers in the District, rather than definitive or exhaustive. This qualitative information is, nonetheless, valuable for the light it shines on industry problems and priorities and their implications for motor carrier management strategies.

⁷ In part, this is because Federal motor carrier data are organized by state of legal domicile rather than place of usual operation, making it difficult to generate an appropriate sampling frame.

4.2 INTERVIEW SUMMARIES BY INDUSTRY

While each of the stakeholder organizations interviewed presented its own unique set of trucking-related concerns, companies within similar industry groups tended to have similar patterns of daily trucking operations and sets of priorities and concerns. The following section presents brief summaries of the interview findings from each industry group. Again, company names and other identifying information have been removed to preserve the anonymity of the interviewees.

Food, beverage, and linen

Companies in these lines of business are generally based at central distribution facilities in the New York Avenue corridor or suburban Maryland. From these facilities, they make numerous trips each day to their customers, who are located throughout the city, particularly in the main commercial corridors where restaurants, bars, and hotels are located. Due to their need to navigate the urban core, these firms primarily use step vans and box trucks rather than long trailers. The main concerns of these companies are related to access to loading areas; they often receive parking tickets or find that access to an off-street loading area is blocked. Traffic congestion is also a concern, particularly because their delivery times are dictated by customer requirements and thus cannot be changed easily. In the same vein, they have concerns about any efforts to restrict delivery times. Opinions were mixed about ideas such as instituting meter fees in loading zones.

Parcel and letter delivery

These firms also operate from central sorting facilities, again located either in the New York Avenue corridor or in suburban Maryland. They make hundreds of stops each day covering all parts of the District, mostly with small trucks and step vans. Since on-time delivery is a key aspect of their business, they are particularly affected by traffic congestion and difficult access to loading zones, and have little leeway to change their hours of operation. Truck restrictions also force changes in routing, which adds to the cost of performing each day's deliveries.

Department stores and supermarkets

These companies make deliveries from a central distribution facility to their retail outlets in the District. They operate a range of vehicles, using their smallest trailers (around 34 feet) for deliveries to inner parts of the District, and larger trailers for suburban and long-distance deliveries. All of their stores have usable off-street loading areas, so their main concern is ensuring that access to these areas remains unimpeded by illegal parking. They also mentioned an interest in seeing roadway improvements along key corridors, to improve pavement conditions and traffic flow.

Conference facilities

These facilities have extensive off-street loading areas (and, where necessary, off-site marshalling yards) to accommodate the hundreds of tractor-trailers that are associated with a major convention. Incoming trucks generally bring convention-related supplies, furniture, decorations, and product samples, often originating in Maryland's Route 50 corridor or the Alexandria, Virginia area. The top problems cited were inadequate signage leading into the

downtown area and the general level of traffic congestion in the Washington region, which makes managing the flow of arriving trucks less reliable and more difficult to manage.

Managers of apartment, office buildings, hotels, and restaurants

Managers of these buildings and businesses are principally concerned with preserving their ability to have reliable delivery of office supplies, building materials, perishable goods, mail and packages, and other shipments. Deliveries of home heating oil are also very important in the winter, and raise potential security concerns. Another set of concerns relates to the security of office buildings. Many office buildings lease space to tenants that might be considered targets for terrorism—U.S. government agencies, major non-governmental and international organizations, and foreign legations—and there is a need to strike a careful balance between truck access and security.

Another concern for managers of buildings with residences or hotel rooms is trash collection. Residents and hotel guests complain of trash collection trucks disturbing their sleep during the early morning and late night hours. They would like to see trash collection done during the daytime or early evening.

Utilities and construction

Utilities and construction companies operate throughout the District with a wide variety of service and repair vehicles. These trucks are based at each company's vehicle maintenance facility and tend to make many short, local trips within the city.

The chief complaint of managers in these industries is that they are bound—unfairly, in their view—by truck restrictions and no-parking rules even when they are performing essential maintenance or works at a site. Utility companies in particular argued that they need to have round-the-clock access to any street in the District where they have a subscriber or facility, and that public-service regulations require them to respond to service outages promptly.

Trash haulers

A primary concern for trash haulers is the time of day they are allowed to be on the streets. District regulations mandate that trash haulers cannot begin working until after 7 AM because of the noise generated by the vehicles. Trash haulers then have to battle congested streets during the AM peak, and even add to congestion with their frequent stops. In addition, trash haulers want to ensure that they continue to have easy access to the Fort Totten trash transfer facility.

Trade groups and Business Improvement Districts

These organizations reinforced the issues and concerns raised by stakeholder firms, stressing the importance of freight movement to the regional economy and the costs imposed by traffic congestion and other delays. They also offered numerous suggestions for citywide and local initiatives to accommodate truck movements more efficiently while also preserving neighborhood quality of life. Several of these suggestions have been incorporated into the Recommendations section of this report.

4.3 OVERALL THEMES

Looking across industries, it is clear that the top problem areas for industry stakeholders include difficulties with loading zones and parking spaces, truck restrictions, and traffic congestion. This section presents and discusses these main themes as well as several others that emerged during the course of the interviews.

First, however, it is worth mentioning a few areas where the interviews indicated that there are relatively few problems. Almost all of the industry stakeholders agreed that truck travel within the District is generally **not inhibited by physical restrictions** such as low overpasses, steep hills, or insufficient turning radii. The stakeholders also agreed that given the time and expense associated with operating in the District, there is **very little truck through-traffic** within the city. In other words, almost all trucks operating in the District have either an origin or a destination within the city. In addition, the relative lack of heavy industry in Washington's economy (see Table 9) means that there is relatively little generation of hazardous materials.

Table 9. Percentage of Total Employment by Selected Industries for the District and the United States, 2001⁸

North American Industry Classification System (NAICS) Sector	District	United States
Goods producing—private	2.36%	19.18%
Goods producing—Federal	0.82%	0.04%
Wholesale trade—private	0.69%	4.42%
Retail trade—private	2.70%	11.71%
Transportation and Warehousing - private	No data	3.19%
Transportation and Warehousing - Federal	1.07%	0.69%
Transportation and Warehousing - local/state	0.74%	0.23%
Total employment	635,734	129,635,800

For many truck operators and delivery recipients, the most important issue is the **lack of loading zones and parking spaces**, especially in the downtown, Dupont Circle, and Georgetown areas. This problem has several different aspects. First, on-street space for parking and loading zones is scarce, and illegally parked cars, tour buses, or street vendors

⁸ State and County Employment and Wages from Covered Employment and Wages, 2001 (NAICS) <http://www.bls.gov/cew/>.

often take up the space that does exist. Second, there is a lack of off-street loading areas, and again, illegally parked cars often take up these areas. Moreover, many of the off-street areas are difficult to access and tend to be insufficiently sized, especially at large complexes where a small area needs to be shared with other trucks serving the buildings at the same time. Third, utility companies and other firms that make service calls at residences find it difficult to park legally for extended periods in areas covered by residential permit parking.

All of these problems contribute to an environment in which truck drivers making frequent stops feel that they have no choice but to park illegally. For many of the stakeholder firms, frequent fines are their top complaint about operating in the District. Representatives from these firms generally agreed that while parking problems and fines are accepted as a cost of doing business in the District, they affect the company's ability to provide acceptable service to their customers and to keep costs in check.

Another theme that came up in many interviews was **truck restrictions**. A number of interviewees felt that the District's truck restrictions make it difficult to serve their customers. For example, utility companies mentioned that to avoid violating truck restrictions, they sometimes have to park several blocks away and carry tools and other equipment over to the work site. At the same time, most interviewees, particularly those that drive primarily on arterials, reported that they are not overly affected by the existing set of truck restrictions. However, they did not want to see any additional restrictions put in place, and they wanted to ensure that major truck routes, especially New York Avenue, would remain open to truck traffic. They also felt that acceptable alternate routes should be provided whenever truck restrictions are put in place. A number of interviewees also mentioned that there are mismatches in restrictions between the District and Maryland and Virginia, requiring them to change their travel routes within the city, costing them time and money.

The general level of **traffic congestion** in the District and in the surrounding metropolitan area was identified as a fairly serious issue by most firms, and indeed some companies listed it as the most problematic issue they face. It was also a common theme of trade groups and BIDs. While traffic problems are an almost inevitable aspect of urban living, the Washington area has the fourth-worst traffic congestion problem in the nation.⁹ Congestion affects all road users, but it affects trucks in particular because of their hourly operating costs and tight timetables for deliveries. It is especially problematic for time-sensitive products, such as perishable goods and mail. In these industries, rescheduling deliveries to less congested times is not always possible because of customer requirements; for example, most restaurants insist on receiving their perishable food in the morning so that they can serve fresh food to their lunchtime customers. Outside of these industries, truck-related businesses generally report that they have "learned to live with" congestion to one degree or another. However, most find that it adds to their operational costs and reduces their ability to provide reliable delivery windows to customers.

In terms of the **safety of the drivers, vehicles, and freight**, truck operators and delivery recipients felt that petty crime is the most important issue, and most of their measures—

⁹ Based on the Travel Time Index in the *2003 Urban Mobility Study*, Texas Transportation Institute.

such as not accepting cash payments—are designed to ensure the safety of the driver. For particularly valuable cargoes, such as liquor, they may also take extra measures such as using numbered seals or requiring a two-person team. Utility companies also reported that they sometimes send two-person crews to work in particularly dangerous neighborhoods.

Some interviewees reported problems with **security-related closures and restrictions** around the U.S. Capitol and White House. Restrictions on Capitol Hill, in particular, have resulted in more traffic on area residential streets as trucks need to find a new route to get past the Capitol Building. Also, each Federal agency has its own rules about which vehicles can enter their property for deliveries and their own set of inspection procedures and requirements. Interviewees felt that Federal security procedures should be standardized across agencies to make it easier for companies to accommodate them.

A number of firms expressed concern about **poor roadway conditions** and paving problems along District roads, particularly New York Avenue and Interstate 295. Truck operators also complained about **missing, inadequate, and confusing signage** in the District. They noted that truck restrictions are not always conspicuously posted and that the signage of major U.S.-numbered routes is not always complete or accurate. At the curbside, there can often be a confusing jumble of signs regulating parking and loading, to the point where it becomes difficult to determine when and under what circumstances parking is legal.

More generally, truck operators felt that there is **confusion over rules and restrictions** and that it is difficult to **interact with the city government** on trucking issues. Interviewees said that there is no single place they can go for information about trucking in the District. They often do not know whom to call to obtain a special permit, such as to close a traffic lane for utility repairs, or when and if such a permit is needed. During large events and demonstrations, they have had to rely on information from the news media because they did not receive any information on road closures or detours from the city government.

Some firms also mentioned that they did not have a clear sense of when they were entitled to exemptions from the usual traffic rules. They expressed frustration at being ticketed for illegal parking when they are actively working at a repair site—or even doing repaving work under contract with the District government. Additional interviews with city agencies confirmed that there is confusion on some of these topics—e.g. double-parking rules—even within the District government itself. A number of firms also mentioned that they would like to interact more quickly and efficiently with city departments.